Session 2: Module 3 - Search Part 3

SCRIPT

Description	Text
Introduction	Welcome to Session 2 Module 3 of the M-SPIRIT Required Online Training presented by the Montana Department of Public Health and Human Services WIC Program.
Start	Participant Search and List – Part 3
<menus>	So far, we've reviewed the search criteria, the Where to Search databases, the Search, Clear and Show Details button, the participant lists and the Show Details panel. Now, let's take a look at the menus on the Participant List screen.
<menus1>	Let's go ahead and refresh our screen. Click the Clear button.
<menus2>	Click the file menu.
<menus3>	The Waiting List is a function we don't use in Montana WIC at this time.
	Click on the System Outputs option.
<menus4>	The System Output options include: Documents, Labels and Reports. These may be reviewed in a later Session.
	Click the System Tools option.
<menus5>	The System Tools options include: Clear On-site List, Change Password, Select Clinic, Set Default Printers and Unlock Locked Household.
	We have reviewed all of these options except Unlock Locked Household, which we will discuss in a later module.
	The last option in the File menu is Exit. This closes the clinic application…
	But remember…
	Exiting the clinic application does not log you out of your M-SPIRIT session!
<icons>	Menu functions that are often used are also available via icons.
	The first icon is for the Waiting List (which we don't use at this time, but other states using this system may).
	The second icon represents System Outputs. You have to click the icon arrow to open its options.
	Click the arrow to view the icon's menu options.
<icons1>	The options are the same ones you saw on the File menu.

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<icons2>	The next icon represents System Tools.
	Just like System Outputs, you have to click the icon arrow to view the options available via the icon.
	Click the arrow to view them.
<icons3>	Again, same as the File menu.
<icons4>	Can you guess what the next icon represents?
	Right. Exits the clinic application...but does NOT log you out of your M-SPIRIT session.
<menus6>	Click the Participant List menu.
<menus7>	Most of the options in the Participant List menu are not enabled until you perform a search except for Create New Household.
	So, let's take a look at that first.
<icons5>	The Create New Household icon is pretty intuitive, isn't it?
	Since you don't have to search for a participant before creating a new household, it is one of the only functions available when the Clinic application is first opened.
NewHH	Before you create a new household, be sure to take the time to ensure that the applicant does not already have a record in the Montana WIC database.
	It is your responsibility to ensure that duplicate participant records are not created.
Important	This is very important in M-SPIRIT since currently M-SPIRIT does not have the functionality necessary to merge duplicate records. If duplicate records are created, data can be potentially lost because the records cannot be combined.
NewHH1	Whenever you have a new applicant, search statewide, enter the person's birthdate ONLY.
	Look in the list for names similar to participant's.
	The question, "Have you ever been on WIC" can be easily misunderstood.
	They may have been on WIC in another county or at another agency and not realize that you have access to those records or that it is the same program.
NewHH2	Most importantly though, be sure to check statewide by birthdate only before creating a new participant.

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PS	New households are created via the Applicant Prescreening, which is necessary to create a new participant record. Once an applicant is prescreened, M-SPIRIT assigns a new Household ID, a unique State WIC ID, and saves the new participant to the Montana WIC database.
<ps>	Let's prescreen a brand new participant to the Montana WIC program.
	Click the Create New Household icon to open the Applicant Prescreening window.
<ps1>	The Applicant Prescreening window collects primarily demographic information.
	Based on your clinic's settings many of the Prescreening fields will automatically populate, including: the county, the state, the clinic you are currently working at, the Language1 and Correspondence Preference fields.
	Many of the fields in this window are required in order to complete a prescreen.
	M-SPIRIT will not allow you to exit the Prescreen until all required fields have been completed.
	Click the OK button at the bottom of the screen to see what happens when required fields are NOT completed.
<ps2>	When you click OK, the system verifies whether you have completed all of the required fields and displays a message indicating the fields you still need to complete to create the new participant's record.
	Click the OK button on the message.
<ps3>	M-SPIRIT then provides a reminder by highlighting the required fields you have yet to complete in orange.
	Let's click the Cancel button to exit the Prescreen without creating a new record…
<ps4>	…and click the Create New Household icon again.
<ps5>	Let's start completing the fields in this screen.
Shortcut	The Tab key on your keyboard is a keyboard shortcut that moves the mouse from one field to the next.
<ps5A>	Type flowers into the Last name field and press the Tab key on your keyboard or click into the First name field.pe flowers into the Last name field.

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<ps6>	Type **delhi** into the First name field and press the Tab key on your keyboard or click into the MI, or middle initial, field.
<ps7>	We aren't going to enter a middle initial although you may choose to do so when prescreening participants.
	Press the Tab key on your keyboard or click into the Birth Date field.
<ps8>	Type 6/20/85 into the Birth Date field and press the Tab key or click into the Address field.
<ps9>	Again, notice that the date fields auto-fills preceding zeros and the first two digits of the year.
	The next field is for the physical address…where the participant lives.
	Do not put a PO Box in this field.
	Type 123 Garden Lane into the Address field and press the Tab key…
<ps10>	Click the WIC Category drop-down arrow.
<ps11>	Delhi is pregnant; select Pregnant from the list.
<ps12>	<no script>
<ps13>	Notice that M-SPIRIT automatically selected Female for the Gender and disabled the field based on your WIC Category selection of Pregnant.
	For all women categories including Pregnant, Breastfeeding and Non-breastfeeding, the system will always auto-select the Gender.
Shortcut1	Most drop-downs in M-SPIRIT have first letter shortcut keys that allows you to select from the drop-down list without opening it.
<ps14>	Since the WIC Category field is highlighted, it is still active. So, to demonstrate the shortcut, simply press the letter "B" on your keyboard.
<ps15>	…and Breastfeeding is selected.
	Now press the letter "N" on your keyboard.
<ps16>	…and Non-breastfeeding is selected.
	Now press the letter "I" on your keyboard.
<ps17>	…and Infant is selected.
	Now press the letter "C" on your keyboard.
<ps18>	…and Child is selected.
	To go full circle and back to the appropriate selection of Pregnant, press the letter "P" on your keyboard.

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<ps19>	Again, this keyboard shortcut applies to every drop-down list in M-SPIRIT.
	As long as the field is highlighted, and therefore active, you can easily and quickly make your selection using the keyboard.
	Press the Tab key to enter the City Field.
<ps20>	Click on the City drop-down arrow.
<ps21>	The list of cities is auto-populated based on the defaulted or selected county.
	Click on BILLINGS to select.
<ps22>	<no script>
<ps22>	The zipcode field will automatically populate if a city spans a single zipcode.
	If a city spans multiple zipcodes, you will need to select from a list of zipcodes that are valid for that city.
	Select 59101.
<ps23>	The ZIP field will automatically populate if a city spans a single ZIP code.
	If a city spans multiple ZIP codes, you will need to select from a list of ZIP codes that are valid for that city.
	Select 59101.
<ps24>	Click the OK button.
<ps25>	The City and ZIP fields now contain your selections.
	The State defaults to Montana and should not be changed since the default county list is based on Montana being populated in the State field.
	The County defaults based upon your clinic settings.
	Click the County drop-down arrow to open the list.
<ps26>	You can select another county if necessary.
	However, if you change the County, the City and ZIP fields will blank because, as mentioned earlier, the list of cities depends upon the selected or defaulted County.
	Click on the County drop-down arrow again to close the list.
	Type 55337 into the Zip field and press the Tab key.

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<ps27>	The Mail section allows you to indicate if the mailing address is different from the residential address.
	It is required since all system-generated labels use these fields for printing addresses.
	The **Same as Residence** button is a shortcut that copies the residential address into the mailing address fields if the addresses are one and the same.
	Click the Same as Residence button to copy the residential address into the Mailing Address.
<ps28>	We will discuss the Applicant Has VOC Document in a future module.
	Notice that there are two telephone number fields.
	The telephone number is not a required field in Prescreen.
	It should be noted, though, that other screens or reports that display the telephone number use the number from Telephone 1.
	Click into the Telephone 1 field.
<ps29>	The area code defaults to 406.
	If the area code is correct, you will need to click after the first 3 digits in the Telephone field before typing.
	With cell phones becoming more prevalent as the primary phone, you should always verify that the default area code is accurate.
	Click into the field (after the 406) and type 4567891. M-SPIRIT will automatically insert the hyphen. Then press the Tab key or click into the Comment field.
<ps30>	Type: Mom's Cell into the Comment field. Note that this field does not auto-capitalize. Then click on the Income Calculator.
<ps31>	The Income Calculator will be thoroughly reviewed in Session 3.
IncomePS	The Income Calculator in Applicant Prescreening functions as a simple calculator to help determine the applicant's income eligibility.
	You can choose to calculate income eligibility but it is not required to complete the prescreen.
Important1	It is important to note that the calculations are NOT SAVED to the database. If income is calculated in prescreen, you will still have to enter income during the certification.

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IncomePS1	If you enter income into the Prescreen calculator, M-SPIRIT provides prompts indicating whether the applicant meets the income guidelines or is over income.
<ps35>	Click the Cancel button to exit the calculator.
<ps36>	In the Household Language section, English defaults into the Language1 fields.
	You can select the Need Interpreter checkbox to indicate the participant will need assistance to communicate if their primary language is not English.
	Let's take a quick look at the language options currently available. Click the Language1 drop-down arrow to open the list.
<ps37>	<no script>
<ps39>	Click the drop-down arrow again to close the list.
<ps40>	The Read and Spoken checkboxes are also default selected for Language 1.
	The Correspondence Preference drop-down has two options: English and Spanish.
	Click the Correspondence Preference drop-down arrow.
<ps41>	If Spanish is selected, M-SPIRIT will automatically print certain documents in Spanish.
CorrespondPref	These are documents that can be provided to the participant and include: the Certification Notice, all appointment reminders (email, letter and postcard) and the Breastfeeding Notice that prints when issuing benefits to moms who are categorized as "Partially Breastfeeding greater than the max amount of formula" for infants who are between 6 and 12 months old.
<ps42>	If nothing is selected, all documents print in English.
	The Language2 drop-down list has the same options as Language1.
	Click the Language2 drop-down arrow and we'll take a quick look.
<ps45>	Select Spanish.
<ps46>	<no script>
<ps47>	Notice the Read and Spoken checkboxes are now enabled and can be selected.
	Let's go back to not having a Language2 selected.
	Click on the Language2 drop-down arrow again.
<ps48>	Click on the blank section of the drop-down list.

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<ps49>	<No Script>
<ps50>	The How Heard about WIC field allows you to collect very basic outreach information.
	It is a required field; you must select from the list to complete the Prescreen.
	Click the drop-down arrow and we will take a quick look at the options available in the list.
<ps52>	Select Billboard Advertisement from the list.
<ps53>	<no script>
<ps54>	The Language1 and 2 and the How Heard about WIC fields are drop-down lists that we have the capability of adding options to.
<ps55>	The Clinic Assigned defaults to the clinic you are currently working in.
	You can assign the participant to another clinic in your agency by selecting from the drop-down list.
	Click the drop-down arrow to view the clinic list.
<ps56>	These are the clinics available to the RIVERSTONE WIC Agency.
	Click on the drop-down arrow again to close the list.
<ps57>	There are three options in the On Completion section that tell M-SPIRIT what to do once you click the OK button.
	Open Participant Folder will open this participant's folder.
	You can also Return to the Participant List, which is the default.
	The last option is to Add Another Member to the household you are creating.
	Since we want to add Delhi's daughter to her household, let's click the Add Another Member radio button.

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<ps58>	The Schedule Appointment checkbox initiates opening the Schedule Appointment window once Prescreen is completed. This functionality will be reviewed in Session 8.
	The Application Date is the current date and is stored in the database as the date the participant's record was created.
	The Cancel button functions the same way in all screens in M-SPIRIT.
	Clicking Cancel exits the screen without saving any changes.
	Never click the Red X on any M-SPIRIT window, doing so will cause loss of the data you have entered.
	The OK button also functions the same in all M-SPIRIT screens.
	It exits the screen and saves all changes.
	Click the OK button.
<ps59>	Since we selected Add Another Member on the previous screen, another Applicant Prescreening automatically opens.
	Notice fields saved for the entire household defaulted such as: residential address, mailing address, telephone, and How Heard about WIC.
	Household level fields only have to be selected or completed one time for everyone in the household.
	At this point, click Cancel. We need to go to the next module.
Questions	Do you have any questions about what we just reviewed? If so, please submit them via the M-SPIRIT Frequently Asked Questions forum on the Montana WIC website.